

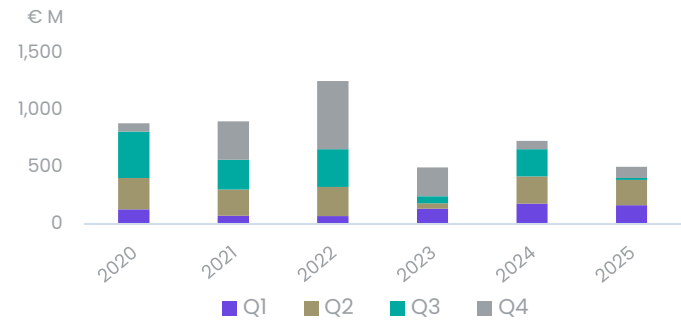
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Q4/2025

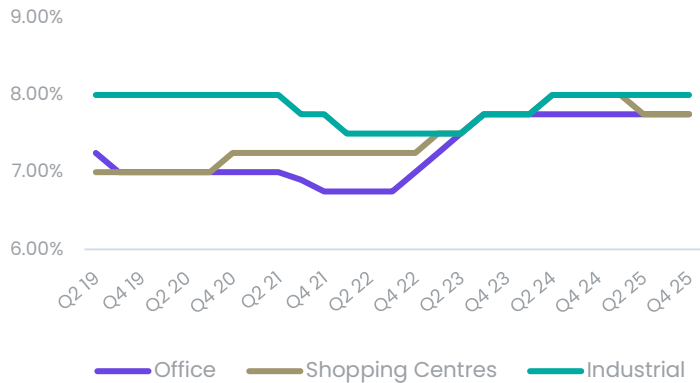


Investment activity in 2025 was 31% below 2024

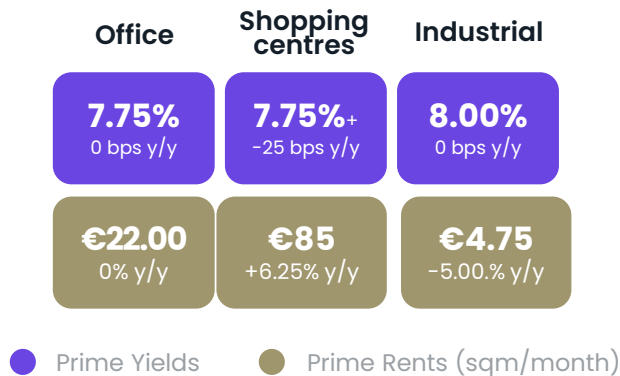
Q4 2025 recorded transaction volumes of €97 million, bringing the total for 2025 to slightly over €500 million



Yields maintain a stable course



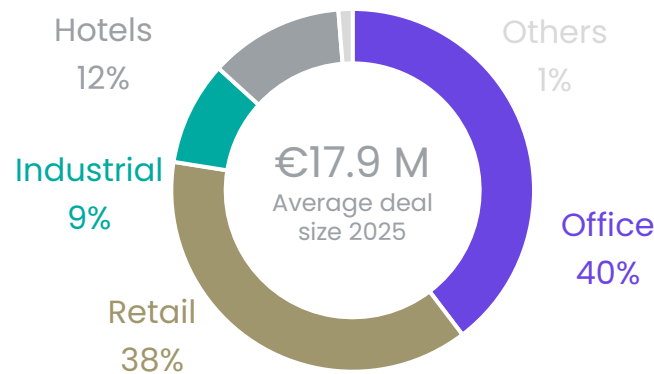
2025 closed with stable rents and yields



International capital keeps the upper hand in investment volumes



Office and Retail were on par



„Investment volumes in 2025 were approximately 30% lower than in the previous year, despite a more positive evolution at a CEE level. This was largely due to not having major transactions (over €60 mil.) Consequently, 2025 marked a growing share of domestic investments.”

Andrei Văcaru, Head of Capital Markets CEE
iO Partners



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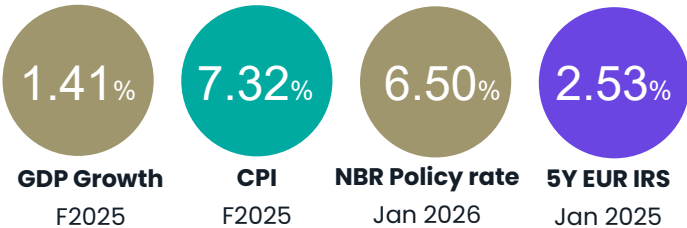
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Key transactions in H2 2025

Property	Sector	Location	Seller	Buyer
Hilton Garden Inn Bucharest Airport	Hotel	Bucharest	Apex Alliance	Confidential
La Cocos retail park Ploiesti	Retail	Ploiesti	La Cocos	Supernova
Terranova Logistic Park	Industrial	Bucharest	Terranova Imobiliare	Suvari

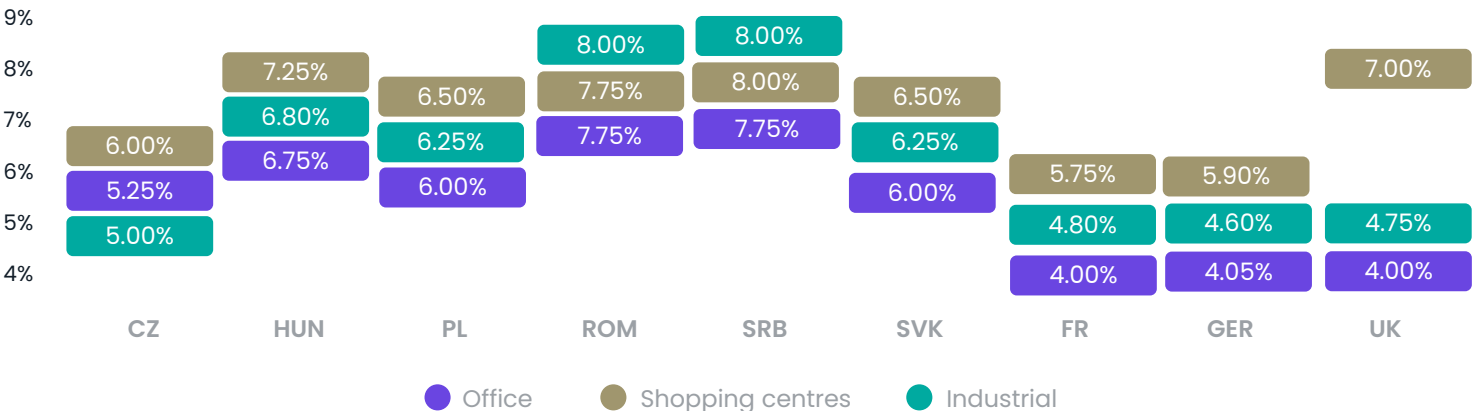
Key economic indicators



GDP growth remains subdued

Source: Oxford Economics, NBR, ECB

Prime yields in CEE and key European markets



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